

**Benefits Committee Meeting****3.****Meeting Date:** 01/16/2025**Submitted By:** Shelley Loughrey, Human Resources**Department:** Human Resources

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**Information****Agenda Item**

Discuss, consider and take appropriate action regarding Holmes Murphy & United Health Care Strategy:

- Financials - Medical/Pharmacy Trend Review
- Large Claims Review
- January 2026 Plan Design Discussion
- Compliance Discussion
- Retiree Coverage Discussion
- Review Committee for Benefit RFPs

**Background**

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**Attachments**

January 2025 Holmes Murphy Benefits Committee Presentation

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**Form Review**

Form Started By: Shelley Loughrey  
Final Approval Date: 01/09/2025

Started On: 01/09/2025 08:04 AM

A decorative graphic consisting of a grid of colored squares in the top left corner. The grid is 3 rows high and 6 columns wide. The colors of the squares are: Row 1: Teal, Orange, Olive Green, Teal, White, Red. Row 2: Purple, Yellow, Red, Orange, Dark Teal, White. Row 3: Dark Teal, White, White, White, White, White.

# Williamson County

January Benefit Committee Meeting

January 16, 2025





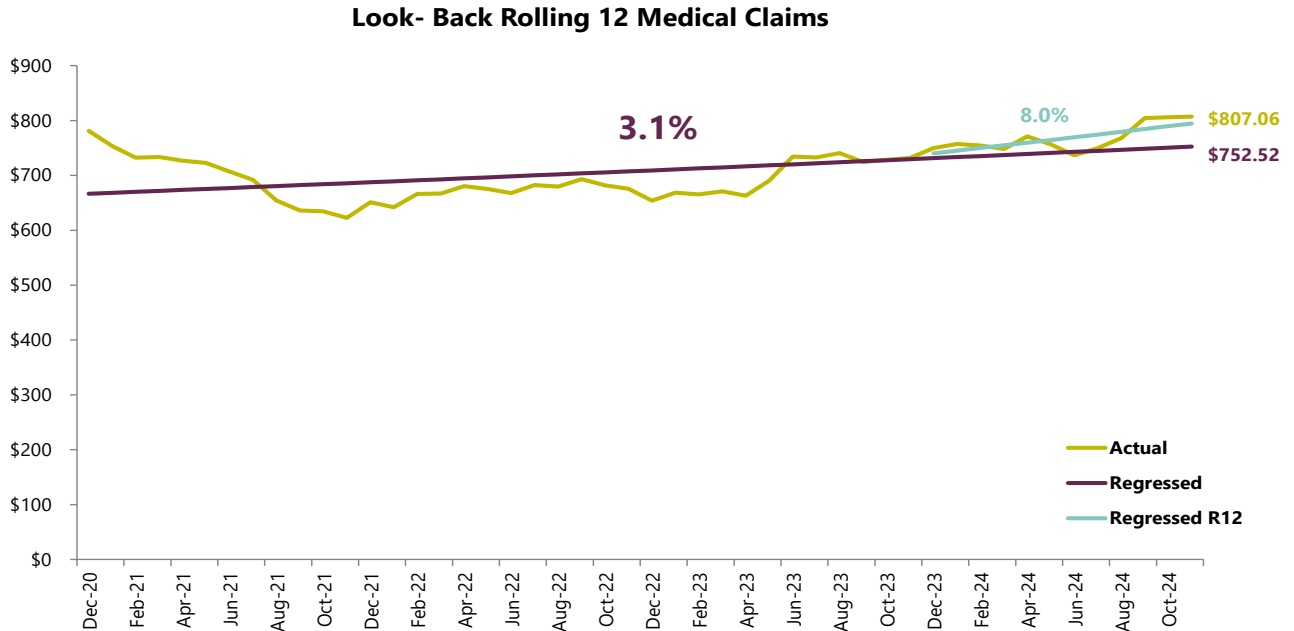
# Agenda

- **Financials**
  - Medical/Pharmacy Trend Review
- **Large Claims Review**
- **January 2026 Plan Design Discussion**
- **Compliance Discussion**
- **Retiree Coverage Discussion**
- **Review Committee for Benefit RFPs**

# Financials

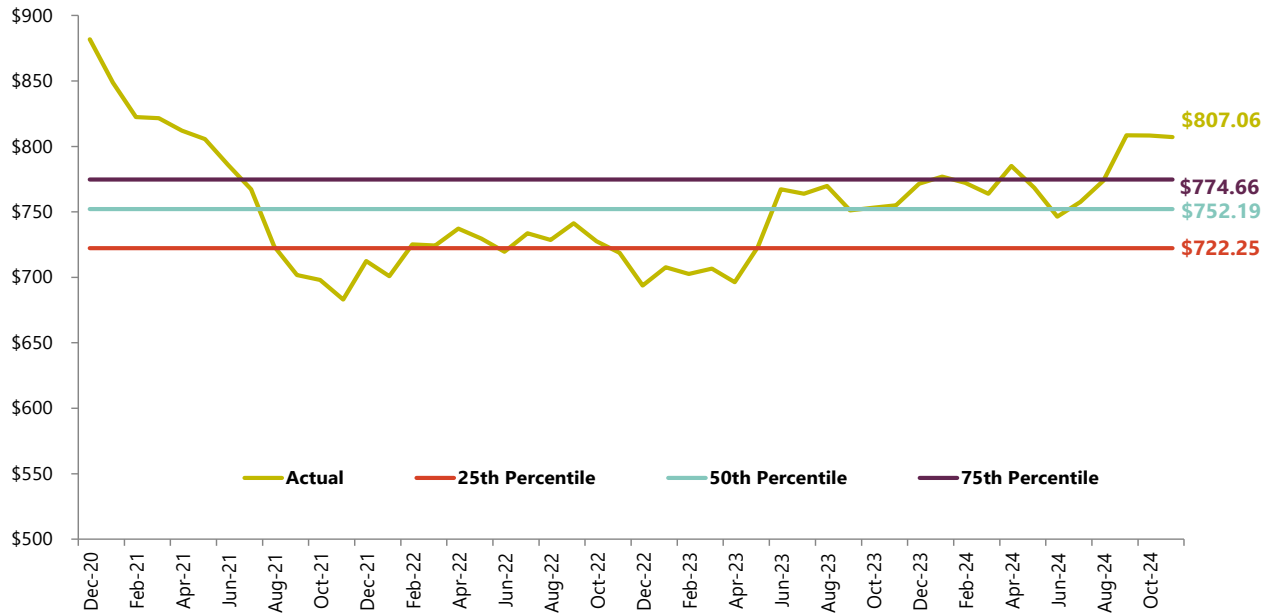
# Financial – Medical Trend, Rolling 12

(before stop loss reimbursements)



# Financial – Medical Trend, PCL

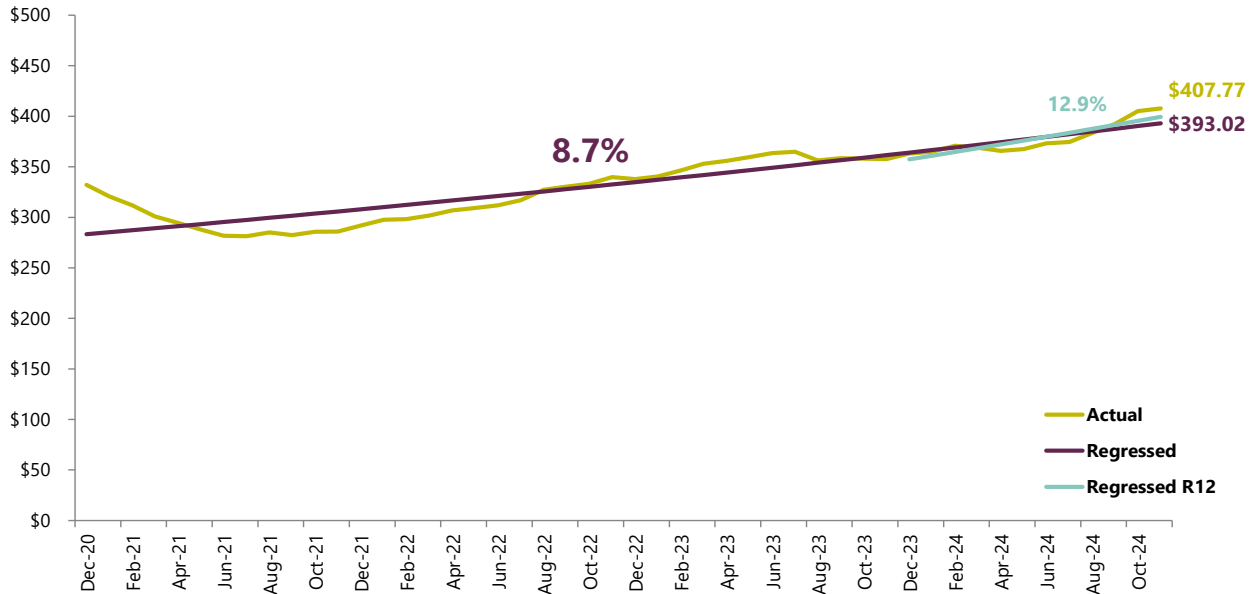
**Past Coverage Level (PCL) - Medical**



# Financial – Pharmacy Trend, Rolling 12

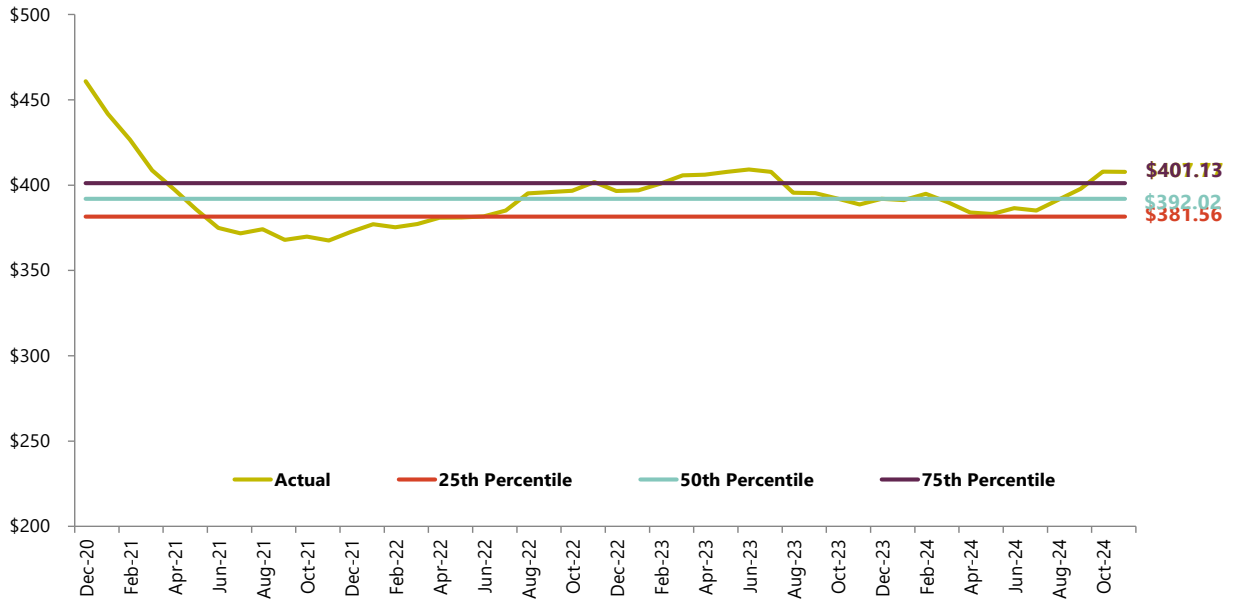
(before rebates)

Look-Back Rolling 12 Rx Claims



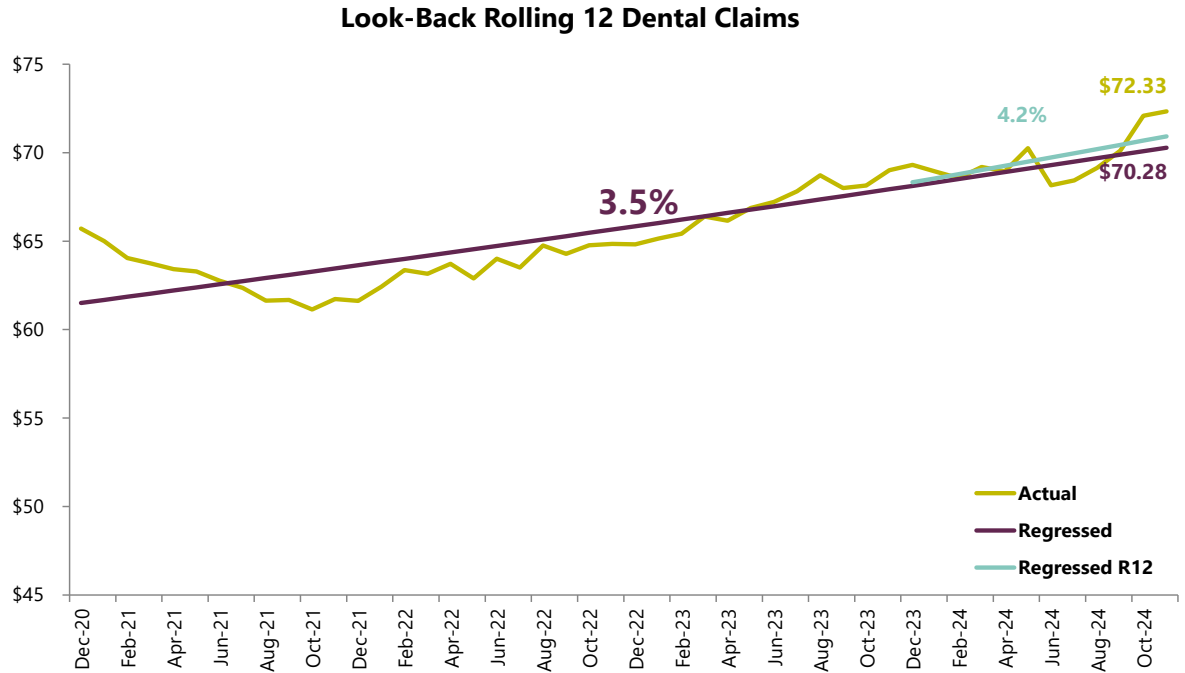
# Financial – Pharmacy Trend, PCL

Past Coverage Level (PCL) - Rx



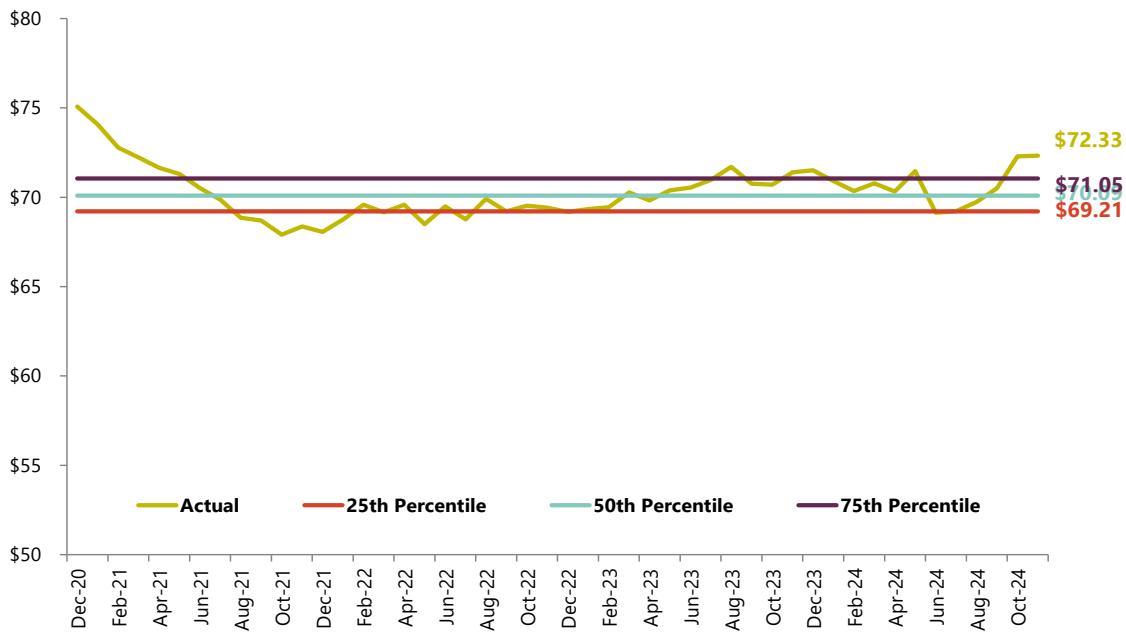


# Financial – Dental Trend, Rolling 12



# Financial – Dental Trend, PCL

Past Coverage Level (PCL) - Dental



# Large Claims

# Large Claims – CY2024, through 11/30/2024

Claimant ID	Relationship Description	Claimant Coverage Status	Medical Diagnosis Code	Medical Diagnosis Code Description	RX Standard Therapeutic Class Description	*Derived Claim Status	Medical Paid	Rx Paid	Total Paid
Claimant 1	EMPLOYEE	ACTIVE	G36.0	NEUROMYELITIS OPTICA	OTHER THERAPEUTIC CLASS	OPEN	\$435,251.41	\$146.39	\$435,397.80
Claimant 2	EMPLOYEE	ACTIVE	Z51.12	ENC ANTINEOPLASTIC IMMUNOTHERAPY	ANTINEOPLASTICS	OPEN	\$329,539.75	\$71,749.54	\$401,289.33
Claimant 3	EMPLOYEE	TERMED	I82.210	ACUTE EMBO THROMBOSIS SUP VENA CAVA	ANTINEOPLASTICS	CLOSED	\$357,333.33	\$25,129.38	\$382,462.71
Claimant 4	CHILD	ACTIVE	J12.89	OTHER VIRAL PNEUMONIA	MISCELLANEOUS	OPEN	\$60,109.60	\$317,817.68	\$377,927.28
Claimant 5	SPOUSE	ACTIVE	Z51.12	ENC ANTINEOPLASTIC IMMUNOTHERAPY	MISCELLANEOUS	OPEN	\$303,451.31	\$59,738.17	\$363,189.48
Claimant 6	CHILD	ACTIVE	S32.82XA	MX FX PLV NO DIST PLV RING INIT CLS	OTHER THERAPEUTIC CLASS	OPEN	\$341,229.52	\$60.71	\$341,290.23
Claimant 7	EMPLOYEE	ACTIVE	N18.6	END STAGE RENAL DISEASE	ANTICOAGULANTS	OPEN	\$278,216.08	\$7,119.86	\$285,335.94
Claimant 8	SPOUSE	ACTIVE	Z51.12	ENC ANTINEOPLASTIC IMMUNOTHERAPY	ANTINEOPLASTICS	OPEN	\$52,568.43	\$217,379.06	\$269,947.49
Claimant 9	EMPLOYEE	TERMED	T84.226A	DISPLACEMENT IF DEVC VERTEBRAE INIT	LIPOTROPICS	CLOSED	\$248,837.58	\$289.14	\$249,126.72
Claimant 10	EMPLOYEE	ACTIVE	C79.51	SECONDARY MALIGNANT NEOPLASM BONE	ANTINEOPLASTICS	OPEN	\$53,492.89	\$193,829.18	\$247,322.07
Claimant 11	SPOUSE	ACTIVE	M48.07	SPINAL STENOSIS LUMBOSACRAL REGION	ANTIVIRALS	OPEN	\$237,834.37	\$1,664.62	\$239,498.99
Claimant 12	EMPLOYEE	ACTIVE	M48.061	SPINAL STENOSIS LUMBAR REGION NO NC	ANTICOAGULANTS	OPEN	\$232,847.93	\$4,221.43	\$237,069.36
Claimant 13	EMPLOYEE	ACTIVE	T82.856A	STENOSIS PERIPH VASCULAR STENT INIT	ANTICOAGULANTS	CLOSED	\$215,530.13	\$4,589.49	\$220,119.62
Claimant 14	EMPLOYEE	ACTIVE	S42.141A	DSPL FX GLND C SC RT SH INIT CLO FX	MISCELLANEOUS	OPEN	\$101,462.02	\$111,411.70	\$212,873.72
Claimant 15	EMPLOYEE	ACTIVE	Z51.0	ENCOUNTER ANTINEOPLSTC RADIATION TX	ANTINEOPLASTICS	OPEN	\$192,273.04	\$18,289.65	\$210,562.69
Claimant 16	EMPLOYEE	ACTIVE	Z51.12	ENC ANTINEOPLASTIC IMMUNOTHERAPY	DIABETIC THERAPY	OPEN	\$192,760.34	\$17,451.68	\$210,212.02
Claimant 17	CHILD	ACTIVE	S85.092A	DTH SPEC INJURY POP ART LT LEG INIT	ANTIDOTES	OPEN	\$198,517.88	\$109.32	\$198,627.20
Claimant 18	CHILD	ACTIVE	S52.502B	JNS FX LOW LT RADIUS INIT OPN I/II	OTHER THERAPEUTIC CLASS	OPEN	\$178,642.40	\$2,751.20	\$181,393.60
Claimant 19	SPOUSE	ACTIVE	G20.82	PARK DZ W DYSKINESIA AND FLUCTUATN	ANTIPARKINSON	OPEN	\$103,421.32	\$53,065.08	\$156,486.40
Claimant 20	EMPLOYEE	ACTIVE	M48.02	SPINAL STENOSIS CERVICAL REGION	OTHER THERAPEUTIC CLASS	OPEN	\$149,394.20	\$1,479.64	\$150,873.84
Claimant 21	SPOUSE	ACTIVE	J10.1	FLU D/T OTH ID FLU VIR OTH RSP MANF	ANTIARTHRITICS	OPEN	\$7,995.62	\$137,421.68	\$145,417.30
Claimant 22	CHILD	ACTIVE	Z93.0	TRACHEOSTOMY STATUS	MISCELLANEOUS	OPEN	\$34,414.97	\$107,740.05	\$142,155.06
Claimant 23	CHILD	TERMED	999.999	OTHER DIAGNOSIS	OTHER ANTIINFECTIVES	CLOSED	\$138,948.05	\$50.47	\$138,998.52
Claimant 24	CHILD	TERMED	Z38.01	SINGLE LIVEBORN INFANT DELIV C-SECT	ANTIINFUNGALS	CLOSED	\$120,715.29	\$21.95	\$120,737.24
Claimant 25	SPOUSE	ACTIVE	T81.43XA	INFCT FL PRC ORG SPCE SRG SIT INIT	ESTROGENS	CLOSED	\$110,688.91	\$3,020.77	\$113,709.68
Claimant 26	CHILD	ACTIVE	999.999	OTHER DIAGNOSIS	OTHER THERAPEUTIC CLASS	OPEN	\$112,686.73	\$608.91	\$113,295.64
Claimant 27	CHILD	ACTIVE	O32.1XX0	MATERNAL CARE BREACH PRES NA/UNS	MISCELLANEOUS	OPEN	\$27,844.72	\$85,083.50	\$112,928.22
Claimant 28	EMPLOYEE	ACTIVE	K50.00	CROHNS DISEASE SM INTEST W/O COMP	MISCELLANEOUS	OPEN	\$24,275.72	\$87,280.93	\$111,556.65
Claimant 29	CHILD	ACTIVE	999.999	OTHER DIAGNOSIS	GLUCOCORTICOIDS	OPEN	\$109,028.75	\$41.46	\$109,070.21
Claimant 30	CHILD	ACTIVE	999.999	OTHER DIAGNOSIS	ADRENERGICS	OPEN	\$106,284.97	\$1,379.86	\$107,664.83
Claimant 31	EMPLOYEE	ACTIVE	L40.50	ARTHRORHATIC PSORIASIS UNSPECIFIED	ANTIARTHRITICS	OPEN	\$919.57	\$102,841.01	\$103,760.58
Claimant 32	SPOUSE	ACTIVE	K56.600	PART INTESTINAL OBST UNS AS TO CAU	ALL OTHER DERMATOLOGICALS	CLOSED	\$47,183.20	\$55,583.33	\$102,766.53
Claimant 33	EMPLOYEE	ACTIVE	J02.0	STREPTOCOCCAL PHARYNGITIS	ALL OTHER DERMATOLOGICALS	OPEN	\$714.88	\$100,766.64	\$101,481.52
Claimant 34	CHILD	ACTIVE	999.999	OTHER DIAGNOSIS	OTHER THERAPEUTIC CLASS	OPEN	\$100,404.70	\$798.54	\$101,203.24
Claimant 35	SPOUSE	ACTIVE	R31.9	HEMATURIA UNSPECIFIED	ALL OTHER DERMATOLOGICALS	OPEN	\$1,978.72	\$99,206.05	\$101,184.77
Claimant 36	EMPLOYEE	ACTIVE	S82.61XP	DSPL FX LM RT FIB SUB CLO MALUNION	OTHER THERAPEUTIC CLASS	OPEN	\$100,892.65	\$1,992.00	\$102,884.65

# 2026 Plan Changes Discussion

# 2026 Plan Design Discussion

- Plan Design Discussion
  - Deductibles
  - Out-of-Pocket
  - Copays
  - Pharmacy Formulary
  - Network
  - Contributions

# Compliance Discussion



# Compliance Discussion

## **NQTL – Quantitative Treatment Limitations Analysis**

- To comply with this requirement, health insurance plans must provide a comparative analysis that demonstrates compliance with the requirements. This is to ensure equal access to care for mental health and substance use disorder (MH/SUD) compared to all other medical conditions.
- If the health insurance carrier or Third Party Administrator (TPA) isn't conducting the testing, it will be up to the plan fiduciary, the employer to either conduct the testing or engage a third party to conduct the testing.
- Holmes Murphy has third-party vendor partners we've used for NQTL analysis. The Cost of this analysis ranges from \$11,000 to \$15,000



# Retiree Coverage Discussion

# Retiree Coverage options

## What else should you consider?

Counties with 75,000 residents:

Sec. 175.002. RIGHT TO PURCHASE CONTINUED COVERAGE. Acts 1993, 73rd Leg.

Amended by: Acts 2009,

Sec. 175.003. LEVEL OF COVERAGE.

(b) Same as when employment ended.

(c) May substitute Medicare supplement health benefits coverage as the coverage.

(d) The person may elect to continue coverage at a reduced level, if offered by the political subdivision.

# Review Committee for Benefit RFPs

# Review Committee for RFP

The County will need to market the following benefits for 2026:

- Group Life/AD&D Benefits
- Voluntary Life/AD&D Benefits
- Short Term Disability Benefits
- Long Term Disability Benefits

A review committee will be needed for the RFP specifications draft requirements and review of the proposals received.

Thank  
you.

**Benefits Committee Meeting****6.****Meeting Date:** 01/16/2025**Submitted By:** Shelley Loughrey, Human Resources**Department:** Human Resources

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**Information****Agenda Item**

Discuss, consider and take appropriate action regarding the Retiree Eligibility Rules for continuance of coverage pre-65 for Williamson County Medical, Dental, Vision, Benefits and Group Life Benefits.

**Background**

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**Attachments**

Retirement Guideline Information

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**Form Review**

Form Started By: Shelley Loughrey

Started On: 01/08/2025 04:39 PM

Final Approval Date: 01/08/2025

Retirees are eligible to take benefits into retirement based on the guidelines listed below.

**Eligibility Enrollment Requirements:**

When the employee is ready to retire, they will meet with the Williamson County Benefits department to make elections for retirement benefits.

- Retirees must be drawing TCDRS retiree payments upon retirement to carry retiree benefits.
- Retirees most recent employment period must have 8 years' consecutive service with Williamson County and upon retirement all Williamson County service time will be applied when calculating monthly premiums rate for medical.
- Medical coverage can be elected if it is carried at the time of retirement. If a retiree does not carry medical, they are not able to elect it as a retiree.
- Retirees can elect vision and/or dental for themselves and their dependents upon retirement.
- Retirees can continue to cover any dependents that are on the medical plan at the time of retirement but are not able to add any new dependents after the initial retirement election period.
- Employees who are eligible to carry benefits into retirement but waive benefits upon retirement are not eligible to enroll in the future.
- Retirees can drop dependents if they gain other coverage but are not able to add the dependent back to coverage once they have been dropped.
- Retirees are required to complete open enrollment annually, provided the Retiree meets the eligibility requirements to be covered.
- Retirees and spouses are subject to the annual wellness actions if they are covered under Williamson County's medical plan.
- Retirees who were covered under retiree benefits and return to FT employment with Williamson County will not lose vested time. If the employee retires again they would not be subject to the 8-year waiting period and would return to the benefit rate table for years of service at which they retired.

**Retiree Benefit Premium Payment:**

- Retirees must have an active bank account for Benefit Premiums that are ACH'd at the first of each month.

**Terminating Retiree Coverage:**

- Retiree will age out of the plan at the end of the month before they turn 65, if the retiree has covered dependents the coverage will be dropped, and the dependents may elect to continue coverage through COBRA coverage.
- If you currently carry additional voluntary term life (VTL) insurance, you can contact Symetra to speak to them about porting your policy into an individual policy.

**Other Retiree Coverage:**

- Basic group life is provided to retirees only who carry medical into retirement. Spouse basic group life and dependent basic group life are not provided.

## Benefits Committee Meeting

8.

**Meeting Date:** 01/16/2025

**Submitted By:** Shelley Loughrey, Human Resources

**Department:** Human Resources

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### Information

#### Agenda Item

Review the Human Resources Department Reports.

- Financial Reports
- 2025 Benefit Committee Meeting Calendar Year
- 2025 Benefit Event Planner - Wellness Week

#### Background

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### Attachments

Sept. 2024 Benefit Fund Report

2025 Benefit Committee Calendar Year Plan

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### Form Review

Form Started By: Shelley Loughrey

Started On: 01/08/2025 01:53 PM

Final Approval Date: 01/08/2025



WILLIAMSON COUNTY  
WILLIAMSON COUNTY BALANCE SHEET  
Current Period: SEP-24

Date: 08-JAN-25 09:13:16  
Page: 1

Currency: USD

Entity=01 (Williamson County), Fund=0885 (WSMN CO BENEFITS FUND)

ASSETS

101000 CASH IN BANK	483,386.57
106000 ACCOUNTS RECEIVABLE	86,400.00
134001 PREPAID EXP-UHC	389,646.88
151100 TEXPOOL PRIME	10,656,675.83
152000 INVESTMENTS	10,003,205.00
155000 INTEREST REC, INVESTMENTS	107,395.83
164200 RIGHT TO USE ASSET	192,703.76
	-----
TOTAL ASSETS	21,919,413.87
	=====

LIABILITIES AND FUND EQUITY

LIABILITIES

202000 A/P LIABILITY	(42,481.19)
202001 CLAIMS LIABILITY	(1,747,124.51)
216000 ACCRUED EXPENSES	(24,389.91)
231130 SUBSCRIPTION LIABILITY	(173,086.36)
281400 AMORTIZED-INTANGIBLE	(385,407.52)
	-----
TOTAL LIABILITIES	(2,372,489.49)
	-----

FUND EQUITY

244000 RESERVE FOR ENCUMBRANCE	0.00
271000 UNRESERVED FUND BALANCE	(19,546,924.38)
	-----
TOTAL FUND EQUITY	(19,546,924.38)
	-----

TOTAL LIABILITIES AND FUND EQUITY	(21,919,413.87)
	=====

09:13:15

## WILLIAMSON COUNTY

Date: 08-JAN-25

Page: 1

## STATEMENT OF REVENUES

Current Period: SEP-24

Currency: USD

Entity=01 (Williamson County), Fund=0885 (WSMN CO BENEFITS FUND), Department=0000 (Default)

Object	Orig Budget	Curr Budget	Monthly Rev	YTD Revenue	Rev Receivable	%Rm
361300 INTEREST, INVESTMENTS	600,000.00	1,106,525.28	90,177.52	1,106,525.28	0.00	0
361900 NET INC/DEC FMV, INVESTMENTS	0.00	0.00	6,805.51	6,805.51	(6,805.51)	n/m
367100 EMPLOYER CONTRIBUTIONS	21,014,400.00	21,014,400.00	1,768,800.00	21,000,000.00	14,400.00	0
367200 EMPLOYEE DEDUCTIONS/MEDICAL	2,767,803.00	3,372,698.95	296,795.13	3,372,698.95	0.00	0
367201 EMPLOYEE DEDUCTIONS/DENTAL	1,268,780.00	1,268,780.00	107,734.00	1,250,692.87	18,087.13	(1)
367202 EMPLOYEE DEDUCTIONS/VISION	352,904.00	428,583.49	37,034.22	428,583.49	0.00	0
367300 COBRA/RETIREE DEP PREM	642,621.00	670,120.16	55,090.28	670,120.16	0.00	0
370500 MISCELLANEOUS REVENUE	0.00	1,805.39	0.00	1,805.39	0.00	0
TOTAL	26,646,508.00	27,862,913.27	2,362,436.66	27,837,231.65	25,681.62	0

09:13:34

## WILLIAMSON COUNTY

Date: 08-JAN-25

## STATEMENT OF EXPENDITURES-BUDGET VS ACTUAL

Page: 1

Current Period: SEP-24

Currency: USD

Entity=01 (Williamson County), Fund=0885 (WSMN CO BENEFITS FUND), Department=0885 (WSMN CO SELF FUNDING INS.)

Object	Original Budget	Current Budget	Monthly Expend	YTD Expend	YTD Exp + Encumb	UnEncumb Balance	Rm%
003600 EMPLOYEE ASSIST. PGRM	40,166.40	36,418.49	3,125.79	36,418.49	36,418.49	0.00	0
004039 RETIREE HEALTH CLAIMS, DENTAL	90,631.99	68,538.28	22,291.25	68,538.28	68,538.28	0.00	0
004040 RETIREE HEALTH CLAIMS, MEDICAL	1,071,414.93	2,425,640.94	380,889.42	2,425,640.94	2,425,640.94	0.00	0
004041 RETIREE HEALTH CLAIMS, PRESCRIPTI	1,107,195.18	1,458,442.71	144,500.59	1,458,442.71	1,458,442.71	0.00	0
004049 HEALTH CLAIMS PAID, DENTAL	1,191,472.46	1,320,127.14	97,147.15	1,320,127.14	1,320,127.14	0.00	0
004050 HEALTH CLAIMS PAID, MEDICAL	13,559,259.75	14,583,054.91	1,787,296.09	14,583,054.91	14,583,054.91	0.00	0
004051 HEALTH CLAIMS PAID, PRESCRIPTION	4,678,705.14	3,612,807.76	758,401.93	3,612,807.76	3,612,807.76	0.00	0
004054 ADMIN COST, HEALTH INS.	1,013,985.00	1,055,245.85	98,119.63	1,055,245.85	1,055,245.85	0.00	0
004056 ADMIN COST, DENTAL	58,968.00	60,599.76	5,204.16	60,599.76	60,599.76	0.00	0
004057 STOP LOSS INSURANCE	1,895,647.32	1,927,809.06	168,428.70	1,927,809.06	1,927,809.06	0.00	0
004058 GROUP LIFE PREMIUMS	75,393.79	59,954.81	5,942.88	59,954.81	59,954.81	0.00	0
004059 ADMIN. COST, FLEX PLAN	36,000.00	18,297.00	1,566.00	18,297.00	18,297.00	0.00	0
004060 ADMIN. COST, COBRA ADMINISTRATION	23,200.00	16,363.97	872.19	16,363.97	16,363.97	0.00	0
004065 RETIREE VISION INSURANCE	27,250.92	26,525.72	2,164.60	26,525.72	26,525.72	0.00	0
004066 EMPLOYEE VISION INSURANCE	352,904.31	427,134.44	36,904.46	427,134.44	427,134.44	0.00	0
004067 EMPLOYER HSA CONTRIBUTIONS	525,000.00	385,125.00	7,500.00	385,125.00	385,125.00	0.00	0
004068 ADMIN. COST, HSA	8,662.50	5,299.25	954.25	5,299.25	5,299.25	0.00	0
004911 COMPLIANCE FEES	13,656.14	29,514.77	16,518.15	29,514.77	29,514.77	0.00	0
004996 WELLNESS PROGRAM	329,930.00	137,410.72	25,864.03	137,410.72	137,410.72	0.00	0
TOTAL	26,099,443.83	27,654,310.58	3,563,691.27	27,654,310.58	27,654,310.58	0.00	0

WILLIAMSON COUNTY

09:13:35

Date: 08-JAN-25

## STATEMENT OF EXPENDITURES-BUDGET VS ACTUAL

Page: 1

Current Period: SEP-24

Currency: USD

Entity=01 (Williamson County), Fund=0885 (WSMN CO BENEFITS FUND), Department=0886 (WSMN CO BENEFITS PGM.)

Object	Original Budget	Current Budget	Monthly Expend	YTD Expend	YTD Exp + Encumb	UnEncumb Balance	Rm%
000000 DEPRECIATION/AMORTIZATION EXPENSE	0.00	192,703.76	192,703.76	192,703.76	192,703.76	0.00	0
001100 F/T SALARIES	348,865.37	361,338.80	44,423.87	361,338.80	361,338.80	0.00	0
001107 TEMP LABOR-SEASONAL HELP	5,000.00	0.00	0.00	0.00	0.00	0.00	n/m
001109 CELL PHONE STIPEND	480.00	480.00	40.00	480.00	480.00	0.00	0
001125 LONGEVITY PAY	1,248.00	1,207.20	153.60	1,207.20	1,207.20	0.00	0
001130 MERIT, RETENTION & RECRUITING	16,742.99	0.00	0.00	0.00	0.00	0.00	n/m
001914 BILINGUAL STIPEND	600.00	512.38	73.86	512.38	512.38	0.00	0
002010 FICA	28,529.63	26,373.22	3,253.22	26,373.22	26,373.22	0.00	0
002020 RETIREMENT	59,053.79	57,944.51	7,175.85	57,944.51	57,944.51	0.00	0
002030 INSURANCE	48,000.00	48,000.00	4,000.00	48,000.00	48,000.00	0.00	0
002050 WORKER'S COMP	568.03	551.87	0.00	551.87	551.87	0.00	0
003005 OFFICE FURNITURE < \$5,000	3,000.00	2,384.86	0.00	2,384.86	2,384.86	0.00	0
003006 OFFICE EQUIPMENT < \$5,000	400.00	540.30	0.00	540.30	540.30	0.00	0
003010 COMPUTER EQUIPMENT < \$5,000	3,738.00	2,170.22	0.00	2,170.22	2,170.22	0.00	0
003011 COMPUTER SOFTWARE < \$5,000	750.00	0.00	0.00	0.00	0.00	0.00	0
003100 OFFICE SUPPLIES	10,000.00	531.05	531.05	531.05	531.05	0.00	n/m
003101 EDUC AIDS/MATLS	0.00	1,310.30	23.98	1,310.30	1,310.30	0.00	0
003900 MEMBERSHIP DUES	3,744.00	2,283.00	0.00	2,283.00	2,283.00	0.00	0
004100 PROFESSIONAL SERVICES	85,000.00	77,916.67	7,083.33	77,916.67	77,916.67	0.00	0
004181 INDEPENDENT AUDIT	22,000.00	22,000.00	0.00	22,000.00	22,000.00	0.00	0

004208 INTERNET CLOUD SOLUTIONS	179,809.00	372,773.36	205,114.44	372,773.36	372,773.36	0.00	0
004212 POSTAGE	3,500.00	1,133.21	1,126.16	1,133.21	1,133.21	0.00	0
004216 POSTAGE METER RENTAL/SUPPLIES	300.00	0.00	0.00	0.00	0.00	0.00	n/m
004231 TRAVEL	1,200.00	0.00	0.00	0.00	0.00	0.00	n/m
004232 TRAINING, CONF., SEMINARS	72,285.52	27,951.59	0.00	27,951.59	27,951.59	0.00	0
004350 PRINTED MATERIALS & BINDING	2,550.00	1,006.81	601.25	1,006.81	1,006.81	0.00	0
004621 COPIER RENTAL & SUPPLIES	2,500.00	1,364.66	239.21	1,364.66	1,364.66	0.00	0
004705 PRE-EMPLOYMENT SCREENING	200.00	0.00	0.00	0.00	0.00	0.00	n/m
004999 MISCELLANEOUS	500.00	299.00	0.00	299.00	299.00	0.00	0
006460 RIGHT TO USE SBITA INT	0.00	2,478.36	2,478.36	2,478.36	2,478.36	0.00	0
TOTAL	900,564.33	1,205,255.13	469,021.94	1,205,255.13	1,205,255.13	0.00	0

# 2025 Benefit Committee Calendar Year Plan

## Key Dates: Benefit Committee Voting Members

Month/Key Dates:	Activity	Leader
<b>January</b>	<b>First Quarter</b>	
16 <sup>th</sup> 9-11	<b>Benefit Committee Meeting – Quarterly Review</b> RFP Financial Services Provider – Employee Education/Coaching	David/Nikki/ Allen/Shelley
<b>February</b>	<b>Wellness Subcommittee Meeting</b>	
7 <sup>th</sup> 1:00 –4:30	<b>Review and evaluate current Wellness Program, discuss changes for 2025</b> Wellness Program Wellness Strategy Plan Incentives 2025	David/Nikki/UHC/ Allen/Angela/ Shelley/C. Long/C. Mendoza
<b>April</b>	<b>Financial Planning Meeting</b>	
17 <sup>th</sup> - Auditor's  9-3	Budget Outline - Tentative Numbers	David/Actuary/Julie /John BC Chair/ Allen/Shelley/Auditor's Office – Julie, Jalyn and Ganae, UHC & Holmes Murphy
<b>May</b>	<b>Second Quarter</b>	
9 <sup>th</sup> 9-3, Full Day  15 <sup>th</sup> 9-12, Half Day	<b>Benefit Committee Meeting – Quarterly Review</b> Budget Proposal, Renewal/Changes Benefit Plans/EE Rates – Medical/Dental/Vision, Potential RFP Financial Services Provider – Employee Education/Coaching, Wellness Strategy for 2024 Benefit Plan Year – Must have final recommendation, Budget Initial #'s, for placement on CC Court	David/Actuary/ Allen/Shelley
<b>August</b>	<b>Third Quarter</b>	
TBD	<b>Open Enrollment Meetings – Webinars Leadership</b> , 2024 Benefit Plan Changes, Rates for Employees/Retirees	Laurie Macina/ BC Committee/ Benefits Team
TBD	<b>In Person OE Meetings – 2024 Benefit Plan Changes for these Departments</b> (URS/Fleet, Building Maintenance, Corrections, Juvenile Services)	Angela/Shelley
<b>September</b>	<b>Third Quarter</b>	
9/22 – 10/3	<b>Open Enrollment Period</b>	Wilco Benefits Team
24 <sup>th</sup>	<b>Benefit Fair In-person – Georgetown Annex, Second Floor</b>	Shelley/Wilco Benefits Team
<b>November</b>	<b>Fourth Quarter</b>	
14 <sup>th</sup> 9-11	<b>Benefit Committee Meeting –Quarterly Review</b> , OE Wrap Up, regular agenda items and Financial Reports.	David/Nikki/ Allen/Shelley

## Detailed Activity Plan

<b>Color Code:</b>	<b>Yellow – Broker Consultant Action</b> <b>Grey – Benefit Committee Meetings</b>	
<b>Month/Key Dates:</b>		<b>Leader</b>
<b>January</b>	<b>First Quarter</b>	
<b>Week of the 13<sup>th</sup></b>	<b>Call/Meet with David/ to Review Agenda</b>	<b>David/Nikki/Shelley</b>
<b>16<sup>th</sup></b>	<b>Benefit Committee Meeting – Quarterly Review</b> Prepare RFP: Financial Services Provider – (Employee Education/Coaching) Employee 1 <sup>st</sup> Qtr., Financial Reports, regular agenda Items	David/Nikki/Shelley/BC Committee
<b>24<sup>th</sup></b>	<b>RFP – Group Life Vendor, Voluntary Life, Short Term, Long Term Disability</b>	<b>David/Nikki/Shelley/</b>
<b>February 7<sup>th</sup></b>	<b>Wellness Subcommittee Meeting</b>	<b>David/Nikki/Allen/Angela/Shelley/Wellness Subcommittee</b>
<b>April</b>	<b>Second Quarter</b>	
<b>17<sup>th</sup> 9-3, Full Day</b>	<b>Financial Planning Meeting - Budget Outline – Work Planning Meeting, Tentative Budget Numbers</b>	David/Actuary/Nikki/UHC/BC Chair, John/Julie Allen/Shelley
<b>1<sup>st</sup></b>	<b>Budget Numbers entered Questica – will use High bid # Received then adjust down for final numbers.</b>	Shelley/Allen
<b>May</b>		
<b>9<sup>th</sup>– 9 -3, Full Day</b>	<b>Benefit Committee Meeting – Quarterly Review</b> Proposal of Renewal Benefit Plans/EE Rates – Medical/Dental/Vision, Wellness Strategy for 2024 Plan Year – Must have final recommendation, Budget Initial #'s, for placement on CC Court.	David/Nikki/Actuary/Allen/Shelley/BC Committee
<b>15<sup>th</sup> 9-12, Half Day</b>	<b>Benefit Committee Meeting</b> Finalize Benefits Budget, ER Funding, EE Rates, Plan Design Changes, Wellness Actions.	David/Nikki/Allen/Shelley/BC Committee
<b>TBD</b>	<b>Meet with Commissioners (Cook, Boles, Covey) Review Plans, ER Contribution &amp; EE Rates</b>	Allen/Shelley
<b>June</b>	<b>Third Quarter</b>	
<b>TBD</b>	<b>Holmes Murphy to Schedule call with Allen/Shelley, Review Holmes Murphy Presentation and finalize Agenda for Posting on CC Court.</b>	Shelley/Allen/David/Nikki
<b>3<sup>rd</sup> or 10<sup>th</sup></b>	<b>Commissioners Court Presentation and Approval of Benefits 2026 Plan Year: (Med/Den/Vision, FSA/HSA Cafeteria Plan – Plans &amp; Rates.) Once approved Holmes Murphy to update Wilco Benefit Guide.</b>	David/Allen/Shelley
	<b>Final Budget – Questica</b>	Allen/Shelley
<b>July</b>		
<b>10<sup>th</sup></b>	<b>Finalize 2026 Benefit Guide due by July 10<sup>th</sup></b>	Holmes Murphy – Nikki/David
	<b>2026 OE Communications Prep: Benefit Guide, &amp; Benefit Portal Updates for Open Enrollment</b>	David/Nikki/Shelley/Angela/UHC/Benefits Portal
<b>August</b>		

1 <sup>st</sup>	All Open Enrollment Communication Materials Finalized	Shelley, UHC, Benefits Portal
TBD	UHC/Shelley Schedule Leadership/Elected Officials/HR Liaisons Present 2023 Plan Changes – Webinars	Shelley/Angela Allen/Benefits Team
TBD	In Person OE Meetings – 2024 Benefit Plan Changes for these Departments (URS/Fleet, Building Maintenance, Corrections, Juvenile Services, Parks)	Angela/Shelley
31 <sup>st</sup>	Budget Adopted	Allen/Shelley
September		
22 <sup>nd</sup> – Oct. 3rd	Open Enrollment Period	Shelley/Benefits Team
24 <sup>th</sup>	Benefit Fair – Georgetown Annex, 2 <sup>nd</sup> Floor	Shelley/Benefits Team
October	Fourth Quarter	
1 <sup>st</sup> – 3rd	Open Enrollment Period	Employees/ Retirees
Week of - TBD	Holmes Murphy to Schedule Call with Allen/Shelley, Review Agenda for BC Agenda Publication on Sept. 27 <sup>th</sup> Items to be included: Stop Loss RFP Draft/Review	David/Nikki/Allen/Shelley
November		
1 <sup>st</sup>	Holmes Murphy & BC Selection Committee to Review RFP Stop Loss Quote & Make Recommendation to Committee	David/Nikki/Allen/Shelley/ Review Committee
14 <sup>th</sup> 9 -11	Benefit Committee Meeting –Quarterly Review, regular agenda items and Financial Reports.	David/Nikki/Allen/Shelley/ BC Committee
December		
TBD	CC Court Approval Stop Loss RFP	Allen/Shelley